

**Associate Performance Planning Worksheet - AFGE Bargaining Unit Employees**

Employee Name: [REDACTED]

Position: Financial Management Specialist, GS-0501-12

Organization: BR3F

Main Appraiser [REDACTED]

Date Developed: [REDACTED]

Date Issued: [REDACTED]

**Critical Element: Financial Research and Analysis(25%)****Description:** Supports financial analysis and program accountability. Demonstrates problem solving and resolves program/financial issues.

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Position Description (PD), GSA goals, CFO Performance Plan,	Quality, Timeliness, Consistency	Analytical process thinking / analysis abilities (100%)	Does not meet performance expectations as defined in Level 3	Partially meets performance expectations as defined in Level 3	Consistently and timely communicates with colleagues and customers on financial and program inquiries and issues Research, analyze and resolves problems with complete information and supporting documentation	Meets and often exceeds performance expectations as defined in Level 3	Meets and consistently exceeds performance expectations as defined in Level 3	Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans

**Critical Element: Financial Reporting(25%)****Description:** Provides consistent and timely reporting of financial analysis and program issues.

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistency	Reporting accuracy (100%)	Does not meet performance expectations as defined in Level 3	Partially meets performance expectations as defined in Level 3	Demonstrates ability to problem solve and complete project accurately and timely Able to communicate results and corrective actions	Meets and often exceeds performance expectations as defined in Level 3	Meets and consistently exceeds performance expectations as defined in Level 3	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center

**Critical Element: Teamwork(20%)****Description:** Assist others by providing technical advice, staff assistance, and training.

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistency	Facilitation / actions taken (100%)	Does not meet performance expectations as defined in Level 3	Partially meets performance expectations as defined in Level 3	Actively aid and participate in peer(s), Agency, and supervisory knowledge of BFMD roles and responsibilities (within scope of assigned work and pass off of work to others)	Meets and often exceeds performance expectations as defined in Level 3	Meets and consistently exceeds performance expectations as defined in Level 3	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center

**Critical Element: Customer Service(10%)****Description:** Provide assistance to regional employees and external customers.

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
PD, Intern program, GSA Goals	Quality	Customer satisfaction (100%)	Does not meet performance expectations as defined in Level 3	Partially meets performance expectations as defined in Level 3	Product(s) are satisfactory to the customer and due dates are met Displays knowledge and understanding of customer's financial needs related to their operations Responds positively, effectively, and promptly to customer requests	Meets and often exceeds performance expectations as defined in Level 3	Meets and consistently exceeds performance expectations as defined in Level 3	Supervisory and panel observation, Individual Development Plan, Associates' Input

This worksheet is only intended to assist you in completing the OFFICIAL Associate Performance Plan and Appraisal documents as identified by GSA Order CPO P 9430.1

## Associate Performance Planning Worksheet - AFGE Bargaining Unit Employees

Employee Name: (b) (6)

Position: Financial Management Specialist, GS-0501-12

Organization: BR3F

Main Appraiser (b) (6)

Date Developed: (b) (6)

Date Issued: (b) (6)

### Critical Element: Special Projects(20%)

Description: Perform special projects or process improvements as directed by Division Director or Deputy Director.

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistency	timeline and accomplishment, description of phases, participation (100%)	Does not meet performance expectations as defined in Level 3	Partially meets performance expectations as defined in Level 3	Provides recommendations for improvements and identifies best practices and lessons learned Consistently and timely attends relevant meetings and conference calls Demonstrates ability to participate, problem solve, and complete special projects timely	Meets and often exceeds performance expectations as defined in Level 3	Meets and consistently exceeds performance expectations as defined in Level 3	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center